CHAPTER 2: VI. CATALOGING A GEOLOGY SPECIMEN

CATALOG DATA FIELDS INDEX

Geology Data Fields

! Mandatory Field

Must enter Item Count or Quantity

+ Must enter Latitude and Longitude, Township/Range/Section, or UTM Coordinates.

@ The program enters ‘Not Provided’ if you do not complete this field

VI. CATALOGING A GEOLOGY SPECIMEN

A. Overview

1. *What types of specimens do I catalog as geology?*

Catalog rocks, surface process materials, minerals, organic materials, extraterrestrial materials, soils, water samples and ice cores as geology.

2. *Where can I find information on cataloging?*

Refer to the *Museum Handbook*, Part II (*MH-II*), Chapter 3, Cataloging, or the *Museum Property Handbook*, Volume II (*MPH-II*), Chapter 3, Cataloging, for general information on cataloging specimens. Refer to your site-specific cataloging procedures, if available.

Refer to the *MH-II*, Appendix H, Natural History and *MPH-II* , Appendix N, Optional Data for Natural History, for additional information on cataloging natural history specimens.

3. *How many screens does a geology record have?*

The basic catalog record consists of five screens:

- registration (for basic collections accountability data)
- catalog (for descriptive data)
- collection site (for data on the collection site of the specimen)
- geology specialty (discipline-specific screen for descriptive data)
- unit (for unit-specific data that the user defines)

In addition, there are numerous supplemental record screens that can relate to the catalog record. Refer to Chapter 3, Supplemental Records.

4. *How will I know which data are mandatory?*

The instructions in this manual and the on-line help will indicate which fields are mandatory. If you do not enter data in a mandatory field, the program will do one of the following:

- not allow you to save the catalog record, *or*
- enter "Not Provided" in the field

5. *What if I have unverified data?*

It is important to distinguish between unverified data and documented fact. Use a question mark "?" or "(att)" for attributed, to indicate data that are probable but not certain.

6. *Do I have to complete every field?*

Not every specimen will be sufficiently documented to allow completion of all fields. If information is not known, leave the field blank.

7. *Must I enter information from the field label or field notes for the specimen exactly as it appears or is recorded?*

Yes. Recording information exactly as it appears on the field label or tag placed with the specimen by the researcher is necessary to maintain the scientific value of the specimen. Even if there are misspellings on the label, do not change the collector's data. You can enter [sic] after a word or phrase to indicate that you intentionally entered it incorrectly.

8. *How do I add to or change information on an existing catalog record?*

To modify a record:

- click on the modify icon  on the button bar, *or*

- go to Edit on the menu bar and choose Modify This Record from the pull-down menu, *or*

- press the F10 key

A new window will open and you will see "Modify Mode" in the lower- right corner. You can then modify and save the record.

B. Adding a Geology Record

1. *How do I get to my natural history records?*

To access your natural history records:

- From the Home Page or Navigator, double-click on Collections, or expand the tree view for Collections by clicking the icon in front of it (if it is already expanded you will see the icon).

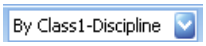
- At the Collection Directory Page (or under Collections in the tree view), double-click on the Natural History directory for your unit.

- At the Natural History directory page, double-click on Catalog Records.

You should see the first record in your natural history database in the Record Pane on the lower right.

2. *How do I get to my geology records?*

To view all your geology records together:

- on the button bar, click on the Sort pull down menu 

and select By Class 1-Discipline, *or*

- click on Record on the menu bar, go to Sort, and on the list of sorts select By Class 1-Discipline

The List Pane will change to show 'Class 1' in the first column. The program has sorted the natural history records by Class 1.

To see the geology records:

- click on a record in the Class 1 column of the List Pane and type "G", *or*
- click on the Find icon on the button bar and type "Geology" in the Find box

This will bring you to the Geology records. To view a record, click on the row in the List Pane and that record will appear in the Record Pane below.

3. *How do I add a geology record?*

To add a new record:

- click on the add icon on the button bar, *or*
- go to Edit on the menu bar and choose Add New Record from the pull-down menu, *or*
- press the F9 key

A new window opens. "Add Mode" is indicated in the lower right of the status bar. You can then add and save a record.

4. *How do I move through the record?*

Within the Field
Press the Home key to get to the beginning of a field or the beginning of a line of text in a memo field. Press the End key to get to the end of the text in a field or the end of a line of text in a memo field.

Field to Field
Press the Tab key to go from field to field. Shift-Tab will take you back one field. You can also move the mouse pointer to the field and single-click.

Page to Page
To move from page to page within a record:

- click on the page tabs at the top of the record, *or*
- press Ctrl-R (previous page) or Ctrl-N (next page), *or*
- press the Left and Right arrow keys (if the page tabs are already selected), *or*
- go to View on the menu bar and choose Previous Page or Next Page

5. *How do I access the supplemental records?*

To access supplemental records :

- click on the Supplemental Information tab on the catalog record, *or*
- press Ctrl-R or Ctrl-N until the page you want

6. *How do I cancel a record?*

To cancel the record without saving the data:

- click on Cancel on the lower right corner of the screen, *or*
- click on the Cancel icon on the button bar, *or*
- go to File on the menu bar and select Cancel

7. *How do I save a record?*

To save a record:

- click Save and Close on the lower right corner of the screen, *or*
- click the Save and Close icon on the button bar, *or*
- go to File on the menu bar and select Save and Close

Note: You can also use the Save option instead of Save and Close. Save leaves the record window open in View mode after saving while Save and Close closes the record window after saving.

If you have not entered data in all the mandatory fields, the program will prompt you to enter the data. The message will list all required fields that have not been completed. The program then asks if you want to save the record as a draft.

If you choose...	***Then the program...***
Yes,	prompts you for tracking information for location, condition, scientific name and catalog notes (see Section D). You can choose not to update the supplemental information for these or enter the information. The program then enters "Draft Record" in the Object Status field and saves the record. **Note:** The program won't allow you to save a draft record if you have a duplicate catalog number.
No,	returns you to the screen to complete the mandatory field(s). **Note:** The mandatory fields will be marked with to indicate which fields are required.

Remember to update the Object Status field for all draft records. A draft record is not an official record. The CMR doesn't count draft records. For the NPS, the National Catalog doesn't count or print draft records.

8. *What are the Images and Multimedia tabs at the top of the catalog record?*

You can attach and display many images of the object on the Images tab. The Multimedia tab allows you to attach other media files such as video and sound clips, documents, spreadsheets, PDF files, etc. Refer to Appendix G in this manual for information on Imaging and Multimedia.

9. *Why does the same Description field appear on most of the tabs?*

The program displays a few lines of the Description field at the top of each of the catalog record's pages, with the exception of the discipline-specific page. You can enter data into any of the screens where the Description field appears and you will see the data you entered on all the screens that have the Description field.

10. *What are the catalog number and date in the upper right corner of the catalog record?*

The catalog number identifies the record. It appears as soon as you enter the number in the Catalog # field. The log date appears when you save the record. It indicates the date the record was entered into the computer.

C. Field-by-Field Instructions

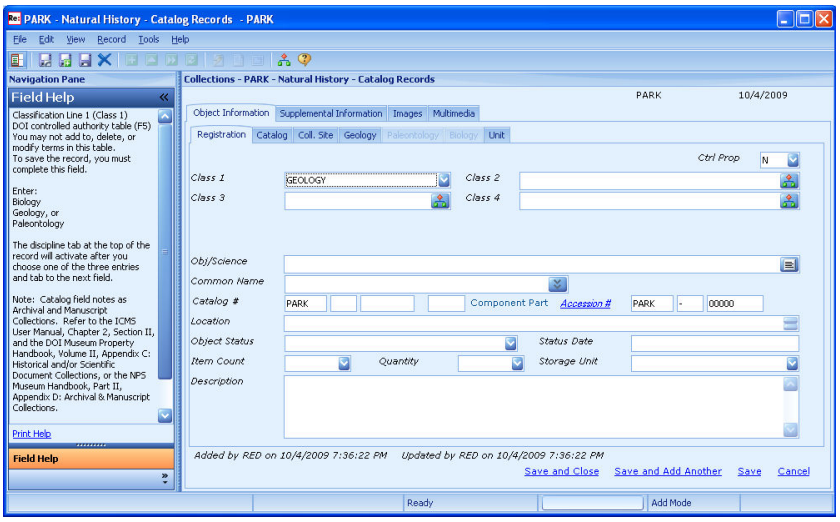
1. *How do I complete the data fields on the registration screen?*

Follow the field-by-field instructions for completing the fields on the registration screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ! in this manual are mandatory fields. You must complete these fields.

Remember to enter an accession record for the catalog record before you begin to catalog. Refer to Section I of Chapter 4 for information on entering accession records. You can also access the accession record from the catalog record as you enter the catalog data by clicking the Accession link.



!*Controlled Property (Ctrl Prop)*

Logical Y/N field. **To save the record, you must complete this field.**

Type "Y" or "N." You can click on the arrow to see a pull-down menu of Y or N. Highlight the entry you want and single-click or press the Enter key.

Select "Y" (Yes) for controlled property. You must designate the following types of specimens as controlled property:

- specimens with a value of $1,000 or more
- type specimens
- incoming loans (with the exception of incoming loans to repositories)

- specimens especially vulnerable to theft, loss, or damage

Select "N" (No) for non-controlled property.

Classification Line 1 (Class 1)

Bureau controlled table (F5). **To save the record, you must complete this field.** You may not add to, delete, or modify terms in this table.

Enter: GEOLOGY

Type "G" and the program will autofill the entry. Or you can press the F5 key or click the down arrow to view and select 'GEOLOGY' from the table.

The Geology discipline tab will become active at the top of the record.

Note: Catalog field notes as archives. Refer to Section II in this chapter and the *MPH-II*, Appendix C: Historical and/or Scientific Document Collections, or the *MH-II*, Appendix D, Archival and Manuscript Collections.

Classification Lines 2-4 (Class 2, Class 3, Class 4)

Hierarchical Classification Outline (HCO) lexicon. **To save the record, you must complete these fields.** You may not add to, delete, or modify terms in these tables.

All entries are based on the NPS Hierarchical Classification Outline lexicon. Refer to Appendix E: Lexicons, in this manual for additional information on lexicons.

After you enter "Geology" and press the Tab key, the program jumps to Classification line 4. After you complete line 4 and press the Tab key, the program will automatically backfill the entries for Classification lines 2 and 3.

Note: Refer to the NPS *Museum Handbook*, Part II, Appendix H, to see the HCO classification outline for geology.

As you type the term will complete from the HCO. Press F5 or click the lexicon icon  to access the table of HCO entries.

Example: Classification line 4 – enter Sandstone and press the Tab key

Classification line 3 – backfills with Sedimentary

Classification line 2 – backfills with Rocks

When you have finished entering the classification, use the Tab key to tab to the Object/Scientific Name field.

Composite Classification

You can classify composite specimens in one of two ways:

- according to the specimen of primary interest, *or*
- by entering COMPOSITE in line 4 of the classification (you may also enter COMPOSITE in Classification lines 2 and 3, if needed)

If you enter COMPOSITE in line 4, the program will not automatically backfill lines 2 and 3. Press Shift-Tab to return to Classification line 3 and choose an entry from the table.

If you enter COMPOSITE in line 3 as well, the program will not automatically backfill line 2. Press Shift-Tab to return to Classification line 2 and choose an entry from the table. COMPOSITE is also an entry in the table for Classification line 2.

Unknown Classification

Sometimes a geology specimen is not fully identified when the specimen label is prepared. If you do not know the classification entry, you may enter UNKNOWN in Classification lines 2-4, as needed.

If you enter UNKNOWN in line 4, the program will not automatically backfill lines 2 and 3. Press Shift-Tab to return to Classification line 3 and choose an entry from the table.

If you enter UNKNOWN in line 3 as well, the program will not automatically backfill line 2. Press Shift-Tab to return to Classification line 2 and choose an entry from the table. UNKNOWN is also an entry in the table for Classification line 2.

Material Types with Three Line Classifications

If you are cataloging Minerals, Organic Materials, Extraterrestrial Materials, or Other Surface Process Materials, you will have only a three line classification and must enter UNUSED in Classification line 4.

If you enter UNUSED in Classification line 4, the program will not automatically backfill Classification lines 2 and 3. Press Shift-Tab to return to line 3 and choose an entry from the table. Once you have chosen an entry for line 3, the program will automatically backfill Classification line 2.

❢*Object Scientific Name (Obj/Science)*

Formatted memo field. Press F12 or right-click and select Zoom from the menu to expand the field, or click the formatted memo icon  located in the field. The field will also expand as you type. History tracking field that links to the Scientific Name supplemental record. **To save the record, you must complete this field.**

The field expands into two subfields: Object Scientific Name and Descriptive Name.

An underline separates the subfield entries on the registration screen. If the specimen is unidentified, refer to the *MH-II*, Appendix H. If the specimen requires a descriptive name, use the Descriptive Name subfield to enter the name. You may also use the Descriptive Name field to enter additional specimen names for composite specimens.

Example of unidentified specimen: Mineral, unidentified

Example of descriptive name: sediment sample

Object Scientific Name (Obj. Science) (user-built table) (F5, Ctrl-F5):

Enter the most specific rock or mineral type or surface process materials from the user-built table.

Example: Basalt
Gneiss

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Descriptive Name (Desc. Name) (memo field, F12 to expand):

Enter the descriptive name for the specimen. Standardize names as much as possible.

Example: sediment core sample

Note: You may also use this field to enter additional specimen names for composite specimens.

The program allows you to track changes in scientific name. If you add or modify a scientific name, the program will include the Scientific Name supplemental in the Track Changes window when you save the record. A history of scientific name changes appears in the Scientific Name supplemental record. Refer to Section XXII of Chapter 3 for information on the Scientific Name supplemental record.

Common Name

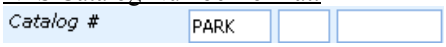
User-built, stacked table (F5, Ctrl-F5, F12)

Do not use this field for geology

❗*Catalog Number (Catalog #)*

For NPS, this is a 3-part 12-character field (sortable by acronym and number). For DOI, this is a regular, unedited, 20-character field. **To save the record, you must complete this field.**

NPS Catalog Number format:



a. The first part is the four-letter park acronym, in the form of "AAAA." (**Note:** The acronym will autofill from the record you were viewing when you began to Add a new record.)

b. The second part is a collection designation. Leave this space blank if the park has only one collection.

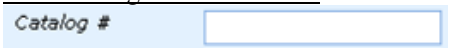
If the park has different units that have separate accession and catalog systems, enter a collection designation in the form of a letter, for example, A, B, C. Only a few parks will use this designation.

The Chief Curator must approve the designation. Review requests to use a designation with the Regional Curator. Send requests in writing to the Chief Curator, WASO.

c. The third part is the unique sequential number assigned to an object, for example, 9999999.

Example: SHEN 190
YELLO 6778 [The Yellowstone NP number contains an O as a designation for the herbarium collection.]

DOI Catalog Number format:



Enter a catalog number using a standard format. The first part of the catalog number should be your unit acronym.

Example: USGS 1988.015.05

Note: The program will not allow you to enter a catalog number of "0" or a duplicate catalog number. After you enter the catalog number, it appears above the record in the upper right corner.

Component Part

4-character field in the form of "a-aa" that links to the Component Parts supplemental record.

Enter suffixes for component parts of objects that you consider to be a single unit, such as pieces of a broken rock. Refer to *MH-II*, Appendix C, or to *MPH-II*, Appendix J, for a further explanation of component parts.

Component part designations:

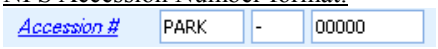
No. parts	Entry
2	a-b
3	a-c
26	a-z
27	a-aa
52	a-az
53	a-ba
78	a-bz

Enter descriptions of each component part in the Component Parts supplemental record. To access the supplemental record, click on the Component Part link, or tab to the link and press the Enter key. Refer to Section IV of Chapter 3 for information on the Component Parts supplemental record.

❗*Accession Number (Accession #)*

For NPS, this is a 3-part 10-character field.
For DOI this is a regular, unedited, 20-character field. **To save the record, you must complete this field.**

NPS Accession Number format:



a. The first part is the four-letter park acronym, in the form of "AAAA." (**Note:** The acronym will autofill from the record you were viewing when you began to Add a new record.)

b. The second part is a hyphen, which distinguishes the accession number from the catalog number. (**Note:** the hyphen will autofill from the previous record as well.)

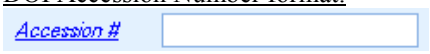
If the park has different units with separate accession and catalog systems, enter a collection designation in the form of a letter, for example, A, B, C, in place of the hyphen. Only a few parks will use a collection designation.

The Chief Curator must approve the designation. Review requests to use a designation with the Regional Curator. Send requests in writing to the Chief Curator, WASO.

c. The third part is the 5-digit identification number assigned to an accession, for example, 99999. The program automatically pads the number with zeroes.

Example: YOSE-00001
JELAB00072 [The Jean Lafitte NHP accession number contains a B as a designation for the Barataria collection.]

DOI Accession Number format:



Enter the number for the accession using a standard format. The first part of the accession number should be your unit acronym.

Example: USGS 1988.015

Note: The accession number links the catalog record to the Accession Records associated module. Refer to Section I of Chapter 4 for information on the Accession Records associated module. The accession record contains the Acquisition Type and Acquisition Date fields that appear on the Museum Catalog Record (NPS Form 10-254B or DOI NH Museum Catalog Record). To go to the accession record, click on the Accession link on the screen. You can view, add, or modify the accession record for the object you are cataloging. Click on Save and Close to return to the catalog record screen. You cannot view, add, or modify the other accession records in the module from this link.

!*Location*

Memo field (F12 to expand). History tracking field that links to the Location supplemental record. **To save the record, you must complete this field.**

Enter the physical storage location of the specimen, starting with the most general location. For example, enter the building number or name, room number, cabinet number, and the shelf number.

Pad location numbers with zeroes if you want to sort by location. For example, use DR04 rather than DR4.

Develop standardized terms and abbreviations for storage areas and use these consistently. Enter locations from general to specific. Separate entries with a space.

A list of recommended abbreviations:

HS	Historic Structure
BLDG	Building
RM	Room
CAB	Cabinet
FCAB	File Cabinet
FCDR	File Cabinet Drawer
MC	Map Case
C	Case
SEC	Section
SH	Shelf
R	Rack
BX	Box
DR	Drawer
U	Unit

Example: HS 1 RM 101 SH 5
BLDG 18 RM 1 U 13

For specimens stored outside the unit, enter the name of the institution where the specimens are located, such as WACC or University of Texas.

Note: If specimens are located in another institution, you can also enter a tracking number used by that institution.

Example: WACC-00254

The program allows you to track changes in location. If you modify a location, the program will include the location supplemental in the Track Changes window when you save the record. See Section D below. A history of location changes appears in the Location supplemental record.

Refer to Section XII of Chapter 3 for information on the Location supplemental record.

❢*Object Status*

Bureau controlled table (F5). History tracking field that links to the Object Status supplemental record. **To save the record, you must complete this field.** You may not add to, delete, or modify terms in this table.

Enter the current status of the specimen. Choose from the following options:

Deacc - Conveyance (Donation)
Deacc - Destructive Analysis
Deacc - Exchange
Deacc - Involuntary Destruction
Deacc - Loss
Deacc - NAGPRA Compliance
Deacc - Return to Rightful Owner
Deacc - Theft
Deacc - Transfer DOI
Deacc - Transfer NPS
Deacc - Transfer Other Federal Agency
Deacc - Voluntary Destruction/Abandonment
Draft Record
Exhibit
Incorporated into Larger Archival Collection
Loan Out - Non-NPS (or Loan Out - Non-Bureau - Federal)
Loan Out - Non-NPS - Non-Federal (or Loan Out - Non-Bureau - Non-Federal)
Loan Out - NPS (or Loan Out - Bureau)
Missing
Record Inactive
Removed - Non-Museum property
Storage

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The program tracks changes in status but doesn't prompt you to enter a reason when you modify a status. A history of status changes appears in the Object Status supplemental record. You can go into the supplemental record and add a reason for status changes, if needed.

Refer to Section XIV of Chapter 3 for information on the Object Status supplemental record.

Remember to update the Object Status field. The program pulls data for the CMR from this field and the Status Date field.

!*Status Date*

Straight entry numeric field. **To save the record, you must complete this field.**

Enter the 4-digit fiscal year for which the status applies.

Example: 1990
2001

Note: The fiscal year runs from October 1 - September 30. The program uses the fiscal year to pull Object Status and Status Date data for the CMR.

!*Item Count*

Straight entry numeric field. **To save the record, you must complete either the Item Count or the Quantity field.**

You must enter either an item count or a quantity (see the following field). There is a calculator linked to the field to help you calculate an accurate count or quantity. Click on the down arrow icon to use the calculator. (Press F4 to close the calculator.)

Enter 1 for a single specimen, even if the specimen has component parts. If the specimen is lot cataloged, enter the total number of objects in the lot. Refer to the *MH-II*, Appendix I, or the *MPH-II*, Appendix E, for information on cataloging lots.

Example: 4 individual quartz crystals = 4

When you enter an item count, the program automatically enters "EA" in the Storage Unit field. If you do not have an item count, leave the field blank.

!*Quantity*

Straight entry numeric field with one decimal place. **To save the record, you must complete either the Item Count or the Quantity field.**

You must enter either an item count or a quantity (see the previous field). There is a calculator linked to the field to help you calculate an accurate count or quantity. Click on the down arrow icon to use the calculator. (Press F4 to close the calculator.)

For bulk specimens (specimens that cannot be readily counted), enter the number of storage units, such as bag or box. If you enter a quantity, the Storage Unit field cannot be "EA." If you do not have a quantity, leave the field blank.

Example: 5 bags of soil samples = 5.0

!*Storage Unit*

User-built table (F5, Ctrl-F5). Default value "EA" when the Item Count is greater than zero. **To save the record, you must complete this field**.

Enter the type of storage unit for bulk specimens (specimens that cannot be readily counted). This is the storage unit for the quantity. For example, the quantity for 2 vials of sand samples is 1.0 and the storage unit is Vial.

Example: Bag
Vial

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

❗*Description*

Memo field (F12 to expand).

Enter a description of the specimen. The description should provide enough information to identify the specimen from others. Enter the most distinguishing and significant features of a specimen. Do not use unauthorized abbreviations or codes.

Note: This field appears on and can be edited from all other screens except the discipline screens.

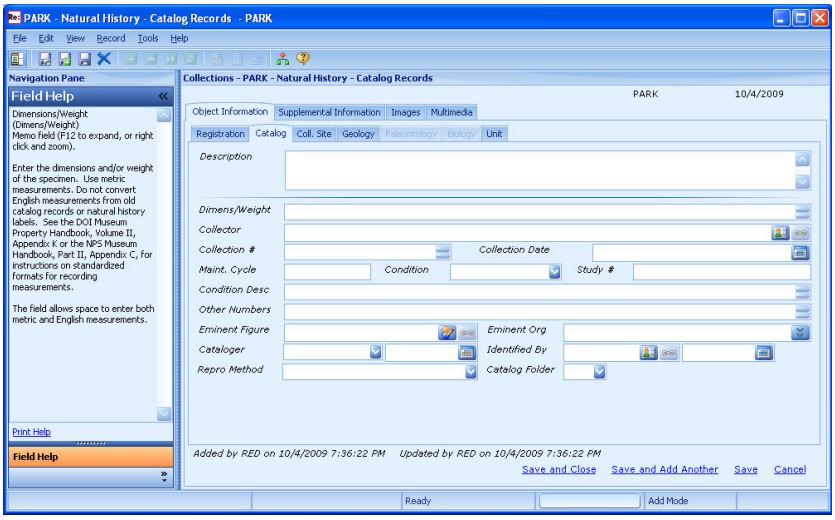
You have completed the registration screen. Click on the Catalog tab or press Ctrl-N to go to the catalog screen.

2. *How do I complete the data fields on the catalog screen?*

Follow the field-by-field instructions for completing the fields on the catalog screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ❗ in this manual are mandatory fields.



Dimensions/Weight (Dimens/Weight)

Memo field (F12 to expand).

Enter the dimensions and/or weight of the specimen. Use metric measurements. Do not convert English measurements from old catalog

records or natural history labels. See *MH-II*, Appendix C, or the *MPH-II*, Appendix K, for instructions on standardized formats for recording measurements.

The field contains space to enter both metric and English measurements.

❢*Collector*

User-built, stacked table (F5, Ctrl-F5, F12) that links to the Names and Addresses associated module. The program will enter "Not Provided" if you do not complete this field.

Note: If there are no names in the Names and Addresses associated module, you must enter them into the authority table before you can enter the name in this field.

Enter the full name of the person, last name first, who collected the specimen.

Example: Merriam, C. Hart

As you type, the word will complete from an authority table of names that have already been entered in the Names and Addresses associated module. Press the F5 key or click the person icon  to view and select names from the table, or press F12 for an expanded field that allows you to enter terms from the table.

If a name is not already listed in the authority table, users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right-click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

Refer to Section XII of Chapter 4 for information on the Names and Addresses associated module.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Note: The record link icon next to the person icon allows you to view the Names and Addresses record for your entry.

❢*Collection Number (Collection #)*

Memo field (F12 to expand). The program will enter "Not Provided" if you do not complete this field.

Enter the field number or other identifying number the collector assigned to the specimen.

❢*Collection Date*

Flexible date field. You must complete this field if you have a collection date.

Enter the date(s) on which the collector collected the specimen. Enter the most complete date possible and the full year.

You can enter the date directly, or press F12 or click the calendar icon for the flexible date entry screen. The flexible date entry allows you to enter a beginning and ending date by century or year, month, and day. It includes a user-built table of modifiers, for entries such as "circa." Refer to Chapter 1, System Basics, for additional instructions on flexible date fields. Use of the flexible date screen is optional.

Maintenance Cycle (Maint. Cycle)

Straight entry numeric field.

Enter the cycle of years (up to 9.9 years) in which a condition check or preservation maintenance/treatment will be needed. You may enter one decimal place for a portion of a year. The year of initiation follows the slash (/).

Example: 5.0/1986 [entry for 5 years starting in 1986]
1.5/1990 [entry for 18 months starting in 1990]
0.5/1994 [entry for 6 months starting in 1994]

Use the Preparation/Treatment associated module to describe the type of maintenance that the specimen needs. Refer to Section VII of Chapter 4 for information on the Preparation/Treatment associated module.

❢*Condition*

Bureau controlled table (F5). History tracking field that links to the Condition Reports supplemental record. **To save the record, you must complete this field.** You may not add to, delete, or modify terms in this table.

Enter the condition of the specimen using one term from each of the two criteria groups:

GROUP I
COM: Complete [100% of specimen present]
INC: Incomplete [>50% and <100% of specimen present]
FRG: Fragment [≤50% of specimen present]

GROUP II
EX: Excellent [no damage or deterioration]
GD: Good [minor damage and no active deterioration]
FR: Fair [some damage and/or active deterioration]
PR: Poor [significant damage and/or active deterioration]

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The program allows you to track changes in condition. If you modify a condition, the program will include the Condition Reports supplemental in the Track Changes window when you save the record. See Section D below. A history of condition changes appears in the Condition Reports supplemental record. Refer to Section V of Chapter 3 for additional information on the Condition Reports supplemental record.

Condition Description (Condition Desc)

Memo field (F12 to expand).

Enter detailed descriptive information on a specimen's condition.

Study Number (Study #)

Straight entry field.

Enter the unique study identification number. The unit assigns this number along with the permit number on the collection permit form. The format is "UNIT-Number." "UNIT" is the unit acronym, and "Number" is the unique tracking number. The study number links all permits, reports, and correspondence related to the study over the life of the project.

Example: ACAD-000001

Note: Study Number is NOT the same as the catalog number or accession number.

Other Numbers

Memo field (F12 to expand).

Record any other numbers that have been assigned to the specimen. This can include catalog numbers from a previous owner or collection or a number assigned by a partner repository if the specimen is not housed at the unit. If known, indicate a source for the other number.

Eminent Figure

User-built, stacked table (F5, Ctrl-F5, F12) that links to the Artist/Maker/Eminent Figure associated module.

Enter the full name, last name first, of the eminent person(s) directly associated with a specimen through use or possession. An eminent figure may be someone of international importance or someone of significance only to the site. To maintain consistent entries, develop a list of eminent figures related to the collection.

Example: Bones, T. J.

As you type, the name will complete from an authority table of names from the Artist/Maker/Eminent figure associated module. Press the F5 key or click the artist icon  to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with appropriate security rights can press Ctrl-F5 or click Edit Authority Table on the expanded field to add, delete, or edit names in the table. Click Add to add a new entry. The Artist/Maker/Eminent Figure screen allows you to enter information such as birth and death years, accomplishments, and nationality. The entry you add will appear in the table.

Refer to Section XI of Chapter 4 for information on the Artist/Maker/ Eminent Figure associated module.

To make multiple entries, press F12 to expand the field. Then click Add or press the down arrow to enter additional terms. On each new line, begin typing or press F5 to select the name from the table. When saved, a double dash -- separates terms.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Note: The record link icon next to the artist icon allows you to view the Artist/Maker record for your entry.

Eminent Organization (Eminent Org)

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the full organizational name of the eminent organization directly associated with a specimen. An eminent organization may be of international importance or of significance only to the site. To maintain consistent entries, develop a list of eminent organizations related to the collection.

Example: The Nature Conservancy

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

❢*Cataloger*

User-built table (F5, Ctrl-F5). **To save the record, you must complete this field.**

Enter the full name, last name first, of the person who cataloged the specimen.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: Change this field only when you make a significant modification to the record. Do not change the cataloger for minor modifications, such as location changes.

Catalog Date

Date field. (**Note:** This date field is not labeled on the screen.)

Enter the numeric month, day, and full year that the object was cataloged. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 4/30/2005

❢*Identified By*

User-built, stacked table (F5, Ctrl-F5, F12) that links to the Names and Addresses associated module. History tracking field that links to the

Scientific Name supplemental record. **To save the record, you must complete this field.**

Enter the full name of the person, last name first, who identified the specimen. If you do not have an entry, enter Unknown.

Example: Jones, Sarah

As you type, the word will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon  to view and select names from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right-click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

Refer to Section XII of Chapter 4 for information on the Names and Addresses associated module.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Note: The record link icon  next to the person icon allows you to view the Names and Addresses record for your entry.

The program allows you to track changes in identifier. If you change the name of the identifier, the program will include the Scientific Name supplemental in the Track Changes window when you save the record. A history of changes in identifier appears in the Scientific Name supplemental record.

Refer to Section XXII of Chapter 3 for information on the Scientific Name supplemental record.

Identified Date

Flexible date field. History tracking field that links to the Scientific Name supplemental record. (**Note:** This date field is not labeled on the screen.)

Enter the date of identification. Enter the most complete date possible and the full year.

You can enter the date directly in the field or click the calendar icon for the flexible date entry screen. The flexible date entry allows you to enter a beginning and ending date by century or year, month, and day. It includes a user-built table of modifiers, for entries such as "circa." Refer to Chapter 1, System Basics, for additional information on flexible date fields. Use of the flexible date screen is optional.

The program allows you to track changes in the identification date. If you change the date the specimen was identified, the program will include the Scientific Name supplemental in the Track Changes window when you save the record. A history of identification date changes appears in the Scientific Name supplemental record.

Refer to Section XXII of Chapter 3 for information on the Scientific Name supplemental record.

Reproduction Method (Repro Method)

Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Choose from the four entries in the table:

Cast
Mold
Other

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Catalog Folder

Logical Y/N field.

Select "Y" (Yes) if a catalog folder exists for the specimen.

Select "N" (No) if there is no catalog folder for the specimen.

Refer to the *MH-II*, Chapter 3, Cataloging, or the *MPH-II*, Chapter 3, Cataloging, for information on catalog folders.

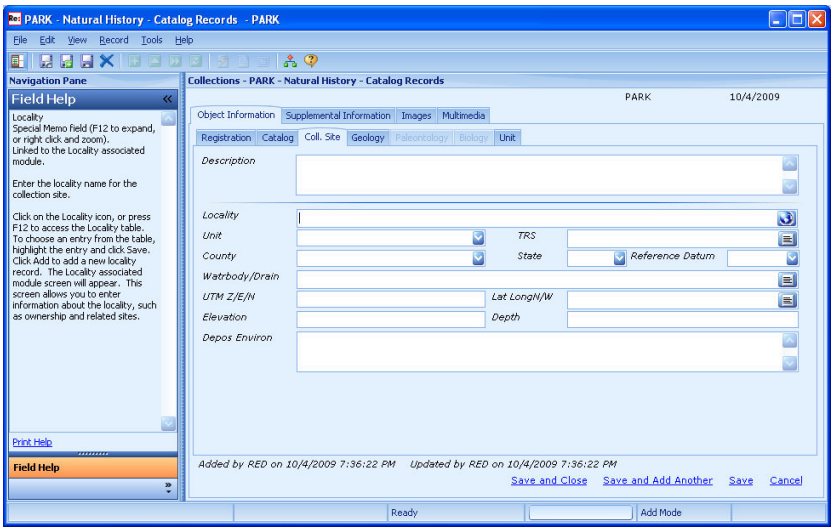
You have completed the catalog screen. Click on the Coll. Site tab or press Ctrl-N to go to the collection site screen.

3. *How do I complete the data fields on the collection site screen?*

Follow the field-by-field instructions for completing the fields on the collection site screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ! in this manual are mandatory fields.



Locality

Special Memo field (F12 to expand, or right click and zoom).
Linked to the Locality associated module.

Enter the locality name for the collection site. You can enter the locality by one of the following options:

- Simply type the locality name in the field, *or*
- Click on the Locality icon, or press F12 to access the Locality table. To choose an entry from the table, highlight the entry and click Save. Click Add to add a new locality record. The Locality associated module screen will appear. This screen allows you to enter information about the locality, such as ownership and related sites.

Refer to Section X of Chapter 4 for information on the Locality associated module.

Unit

User-built table (F5, Ctrl-F5).

If the collection site is within unit boundaries, enter the unit acronym.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

❗*Township/Range/Section (TRS)*

Formatted memo field. **To save the record, you must complete one of these fields: Township/Range/Section, UTM Coordinates, or Latitude and Longitude.** If you don't have any data for these fields, enter Unknown in the memo subfield of the Latitude and Longitude field.

New records should have UTM or Lat/Long data. Use TRS data only if UTM or Lat/Long data are not available. Press F12 or right-click and select Zoom

from the menu to expand the field, or click the formatted memo icon  located in the field. The field will also expand as you begin to type.

The field will expand into six subfields: Township, Range, Section, and three Quarter subfields. An underline separates the subfield entries on the collection site screen.

Enter the township, range, and section of the collection site, if the collector provides these data. The subfields are formatted as follows:

Township = T. + 3 numbers and 1 character
Range = R. + 4 numbers and 1 character
Section = Sec. + 2 numbers

Use the arrow keys to skip spaces.

Example: T.2O N. __R.118 W. __Sec.5.

Enter the appropriate Quarter abbreviation NE, NW, SE, or SW. The smallest quarter section is listed first. In the U.S. and Canadian system of land surveying, the smallest quarter section is a tract of land that contains 10 acres while the largest quarter section is half a mile square that contains 160 acres (648 hectares). The subfields are formatted as follows:

Quarter = 2 characters + 1/4	(First = 10 acres)
Quarter = 2 characters + 1/4	(Second = 40 acres)
Quarter = 2 characters + 1/4	(Third = 160 acres)

Example: NE 1/4

Quad Map Name (straight entry):

Enter the quadrangle map name from the USGS topographic map series that was used to determine the township/range/section data. Most USGS map series divide the United States into quadrangles bounded by two lines of latitude and two lines of longitude. For example, a 7.5-minute map shows an area that spans 7.5 minutes of latitude and 7.5 minutes of longitude, and it is usually named after the most prominent feature in the quadrangle. More than 55,000 7.5-minute maps were made to cover the 48 conterminous States. This is the only uniform map series that covers the entire area of the United States in considerable detail.

Quad Map Scale (user-built authority table -- F5, Ctrl-F5):

Click the down arrow or press F5 and choose the scale of the quadrangle map from the USGS topographic map series that was used to determine the township/range/section data. The best known USGS maps are the 1:24,000-scale topographic maps, also known as 7.5-minute quadrangles or "quads". Maps at scales of 1:250,000 (1 inch = about 4 miles), 1:500,000 (1 inch = about 8 miles), and 1:1,000,000 (1 inch = about 16 miles) cover very large areas on each sheet and are used in regional and statewide planning.

Quad Map Year (straight entry):

Enter the year that the quadrangle map was published. The United States Geological Survey has been the primary civilian mapping agency of the United States with the responsibility for mapping the country since 1879.

County

User-built table (F5, Ctrl-F5).

Enter the county from which the specimen was originally collected.

Example: Orange

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

State

User-built table (F5, Ctrl-F5).

Enter the state from which the specimen was originally collected. Use the two-letter US Postal Code. The program includes a table for all states.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Reference Datum

Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Enter the reference datum for the specimen by choosing an entry from the table. All coordinate data such as UTM or longitude and latitude used to identify the spatial coordinates of a locality must be referenced to a datum. This information may be obtained while using a Global Positioning System (GPS) or from the map that is used to determine the coordinates. The two datums used for North America are NAD 27 or NAD 83. One must be selected.

Waterbody/Drainage (Watrbody/Drain)

Formatted memo field. Press F12 or right-click and select Zoom from the menu to expand the field, or click the formatted memo icon  located in the field. The field will also expand as you begin to type.

The field will expand into two subfields: Waterbody and Drainage. An underline separates the subfield entries on the collection site screen.

Both subfields are memo fields. F12 expands each subfield.

Waterbody (memo field):

For aquatic and marine sites only, record the waterbody of the collection site.

Example: Merced Lake

***Drainage (memo field)*:**

For aquatic and marine sites only, record the drainage of the collection site.

Example: Gulf of Mexico
Potomac River

❢*UTM Coordinates (UTM Z/E/N)*

Straight entry numeric field. **To save the record, you must complete one of these fields: Township/Range/Section, UTM Coordinates, or Latitude and Longitude.** If you don't have any data for these fields, enter Unknown in the memo subfield of the Latitude and Longitude field.

Enter the UTM (Universal Transverse Mercator Grid) coordinates for the collection site, if the collector provides these data. You cannot enter characters. The field is divided into three parts separated by slashes (/):

a. UTM Zone = 2 numbers

b. Easting = 6 numbers

c. Northing = 7 numbers

Example: 05/291000/4264000 [entry for UTM zone 5, 291000E, 4264000N]

❢*Latitude and Longitude (Lat LongN/W)*

Formatted memo field. Press F12 or right-click and select Zoom from the menu to expand the field, or click the formatted memo icon located in the field. The field will also expand as you begin to type. **To save the record, you must complete one of these fields: Township/Range/Section, UTM Coordinates, or Latitude and Longitude.** If you don't have any data for these fields, enter Unknown in the memo subfield of the Latitude and Longitude field.

The field will expand into seven subfields: Latitude Longitude, Latitude Degree, Latitude Minutes, Latitude Seconds, Longitude Degree, Longitude Minutes, and Longitude Seconds. An underline separates the subfield entries on the screen.

Enter the standard latitude and longitude for the collection site, if the collector provides these data.

Latitude Longitude (memo field):

F12 expands the subfield.

The other subfields are formatted as follows:

Latitude Degree = 2 numbers
Latitude Minutes = 2 numbers
Latitude Seconds = 2 numbers
Longitude Degree = 3 numbers
Longitude Minutes = 2 numbers
Longitude Seconds = 2 numbers

Precede numbers of less than two or three digits with a zero.

Example: __38 __30 __15 __118 __22 __30 [entry for 38 30' 15" N, 118 22' 30" W]

Elevation

Straight entry field.

Enter elevation, in meters, for terrestrial collection sites. Do not convert English measurements.

Example: 550 m.

The field contains space to enter both metric and English measurements.

Depth

Straight entry field.

Enter depth, in meters, for aquatic/marine collection sites. Do not convert English measurements.

Example: 5 m.

The field contains space to enter both metric and English measurements.

Depositional Environment (Depos Environ)

Memo field (F12 to expand).

Enter information about the environmental conditions under which the specimen was formed. This includes physical processes, such as water and wind; biological processes, such as bioturbation; and chemical processes, such as precipitation.

Example: paludal
swamp
inland sea

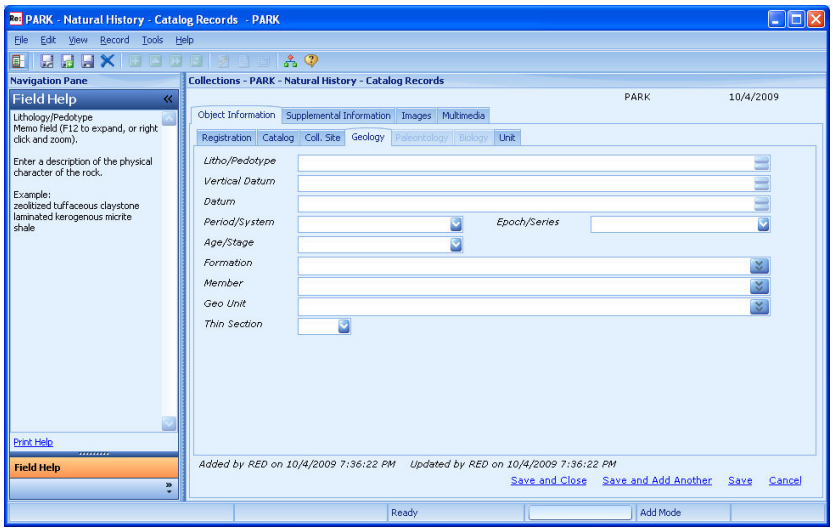
You have completed the collection site screen. Click on the Geology tab or press Ctrl-N to go to the geology screen.

4. *How do I complete the data fields on the geology specialty screen?*

Follow the field-by-field instructions for completing the fields on the geology specialty screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ! are mandatory fields.



Lithology/Pedotype (Litho/Pedotype)

Memo field (F12 to expand).

Enter a description of the physical character of the rock.

Example: zeolitized tuffaceous claystone
laminated kerogenous micrite
shale

Vertical Datum

Memo field (F12 to expand).

Enter the distance of occurrence of the specimen above a particular marker bed(s) identified in the Datum field. The collector determines the distance from an established stratotype or measures the distance using standard measuring systems corrected for dip of beds, etc.

Example: 5.5 meters below

Datum

Memo field (F12 to expand).

Enter the name of the marker bed or strata referenced in a stratigraphic section.

Example: Eagle Crag Ash
K-Spar Tuf
Member G Basalt

❗*Period/System*

User-built table (F5, Ctrl-F5). The program includes a table. The program will enter "Not Provided" if you do not complete this field.

Enter the period or system assigned to the material. Do not use modifiers such as "lower" or "late."

Example: Cretaceous
Anthropogene

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Epoch/Series

User-built table (F5, Ctrl-F5). The program includes a table.

Enter the epoch or rock series, or other assignation. This entry will differ depending on the system used in the area. This hierarchical level is lower than period/system.

Example: Eocene
Lias

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Age/Stage

User-built table (F5, Ctrl-F5). The program includes a table.

Enter the appropriate age or stage for the rock material. This unit is primarily used for intra-continental correlation within a geologic province.

Example: Franconian Age
Claibornian Stage

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

❗*Formation*

User-built, stacked table (F5, Ctrl-F5, F12). **To save the record, you must complete this field.** If you do not have an entry, enter Unknown.

Enter the basic lithostratigraphic unit (the geological formation) from which the specimens were removed. Use only terms acceptable and consistent with the North American Stratigraphic Code. Entries should have no reference to time or age.

For lithodemic units appropriate to intrusives, deformed, and metamorphic rocks, enter the lithodeme, not the suite or complex.

For pedostratigraphic units, enter the geosol.

For sedimentary units mapped primarily on the basis of discontinuities, enter the alloformation.

Example: Dresbach Formation
Jordan Sandstone

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Member

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the appropriate formal stratigraphic subdivision from which the material was recovered. This may take the form of a formal unit, such as the Turtle Cove Member. If the formation has no established subdivisions, use the informal terms in general acceptance. All member names include a geographic term and the word "member." Some contain an intervening lithologic term, such as the Laney Shale Member of the Green River Formation.
For lithodemic units appropriate to intrusives, deformed, and metamorphic rock, enter the informal subunit.

For sedimentary units mapped primarily on the basis of discontinuities, enter the allomember.

Example: Turtle Cove Allomember
Laney Shale Allomember

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Geo Unit

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the bed (if sedimentary) or flow (if volcanic flow rock). Although beds are considered formal units, you may enter informal unit subdivisions, such as the Sandwich Layers.

Example: Trilobite Bed
Lower Interlake Beds
Unit K

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Thin Section

Logical Y/N field.

Type "Y" or "N."

Select "Y" (Yes) if there is a thin section associated with the specimen.

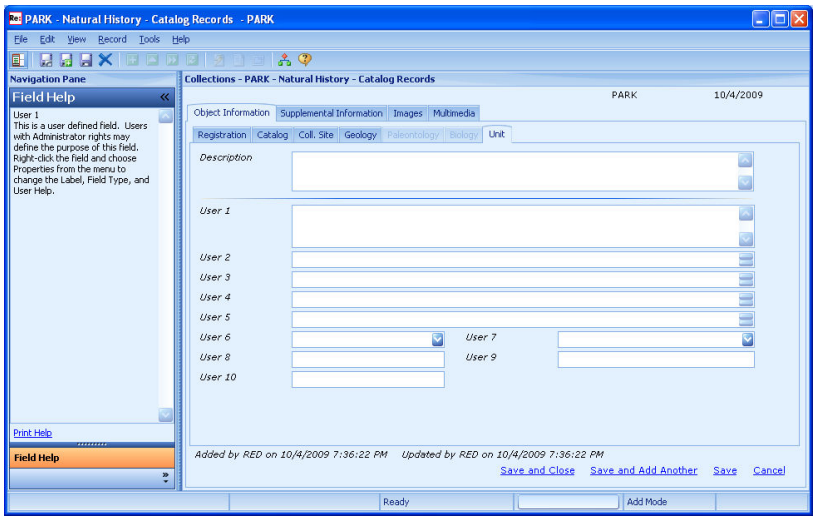
Select "N" (No) if there is no thin section associated with the specimen.

You have completed the geology screen. Click on the Unit tab or press Ctrl-N to go to the unit screen.

5. *How do I complete the data fields on the unit screen?*

There are ten user-defined fields on the unit screen. Enter data in these fields that are unit-specific and that do not fit on the other four screens.

Note: All disciplines in the NH directory share the ten unit fields. You may want, or need, to reserve some user fields for biology and/or paleontology records.



If you are authorized, you may modify each field by right clicking and selecting Properties. In the Field Properties screen, click the modify button or select Modify This Record from the Edit menu. Then, select the Default Label/Help tab. Change the label and field type as needed.

Example: Field Label = Weather
Field Type = Memo

Refer to Chapter 1, System Basics, for additional information on defining user fields and a description of field types.

D. Saving the Record

1. *What is the Track Changes screen that appears when I save a catalog record?*

When you save a catalog record, the program will prompt you for information to track location, condition, catalog notes and scientific name for the specimen. The system will create supplemental records from the information you provide. The supplemental records allow you to see on one screen all the changes in location, condition, scientific name and cataloging activity for the specimen.

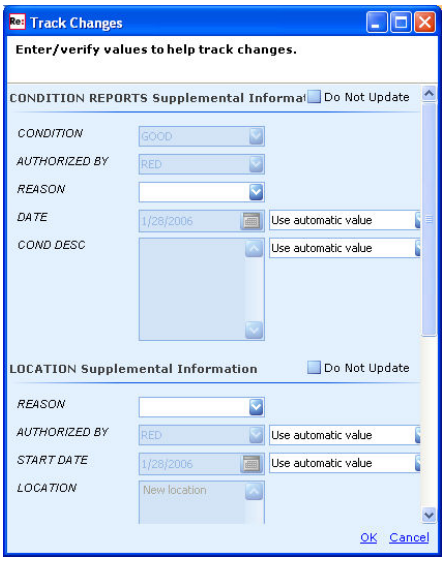
You may choose not to create the supplementals and still save the record. This saves a small amount of time when entering or modifying records. However, the benefits of having location, condition, scientific name and catalog activity histories outweigh the time it takes to create them. Taking advantage of this feature in the program is highly recommended.

When creating a supplemental for tracking, you have the choice of accepting the default entries on some fields in the supplemental, or manually updating the supplemental fields.

To not create a supplemental, click the Do Not Update box on the supplementals you do not wish to create.

Click OK to save the entries from the Track Changes screen in the supplemental records.

Do not click the Cancel link here or you will cancel the entire record, not just the supplemental update.



2. *How do I complete the condition tracking supplemental?*

If you add or change a condition in the Condition field, the program will include the Condition Reports supplemental in the Track Changes screen when you save the record. Complete the Condition Reason field manually. The Condition Reason field is a user-built table (F5, Ctrl-F5). Enter the reason for the condition.

Example: Broken and mended
Conservation

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

You can also change the Date and/or Condition Description if needed. These fields are set to use automatic values. To change the entries, select "Manually update value" from the pull down menu next to the field.
Note: The entry from the Condition Description field appears on the update screen. If you have no entry in the Condition Description field, the field on the prompt screen will be blank. You can enter a condition description on the prompt screen, but it will not transfer back to the catalog record.

Refer to Section V of Chapter 3 for additional information on the Condition Reports supplemental record.

3. *How do I complete the location tracking supplemental?*

If you add or change a location, the program will include the location supplemental in the Track Changes screen when you save a record. Complete the Location Reason field manually. The Location Reason field is a user-built table (F5, Ctrl-F5). Enter the reason for the location.

Example: Storage
Summer Exhibit

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: For permanent locations, enter "Permanent Location" in the Location Reason field. This entry will allow you to print an Object Temporary Removal Slip (Form 10-97) to document removal from a permanent location.

You can also change the Authorized by and Start Date if needed. These fields are set to use automatic values. To change the entries, select "Manually update value" from the pull down menu next to the field.

Refer to Section XII of Chapter 3 for additional information on the Location supplemental record.

4. *How do I complete the catalog notes tracking supplemental?*

If you add or change a catalog record, the program will include the Catalog Notes supplemental in the Track Changes screen when you save the record. All entries are autofilled from the previous data entry session. To change the entries for any of the fields, select "Manually update value" from the pull down menu next to the field.

The Cataloger field is a user-built table (F5, Ctrl-F5). Enter the last name of the cataloger.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: The name you enter at the prompt does not change the name in the Cataloger field on the record.

The Level field is a Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Choose from the entries in the table as defined below:

Catalog - you have completed all fields for which there is information.

Minor Change- you have made minor changes, such as spelling corrections or location changes.

Recatalog - you have made substantial changes to the data, such as changes in date, classification, and object name.

Registration - you have completed only the registration screen and mandatory fields on the other 3 screens.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The Notes field is a Memo field (F12 to expand). You may also want to enter notes on the cataloging activity at this time.

Refer to Section III of Chapter 3 for additional information on the Catalog Notes supplemental record.

5. *How do I complete the scientific name tracking supplemental?*

If you add or change the Scientific Name, Identified By, or Identified Date fields, the program will include the Scientific Name supplemental in the Track Changes screen when you save the record.

Enter a reason for the change in the Reason field.

Example: annotation
misidentification
re-verification of the name by a different identifier

Refer to Section XXII of Chapter 3 for additional information on the Scientific Name supplemental record.

E. Supplemental Records

1. *How do I complete the supplemental records that are associated with a geology record?*

Refer to Chapter 3, Supplemental Records, for instructions on completing the supplemental records. Use these records to enter data on appraisals, component parts, images, preservation work, provenance, related databases, research notes, significance, and publication citations.

The program creates the supplemental records for catalog notes, condition reports, location, object status, and scientific name when you save a record. See Section D above. The program will prompt you for information, such as the level of cataloging, or the reason for the location. When you complete the information, the program saves it as a supplemental record.

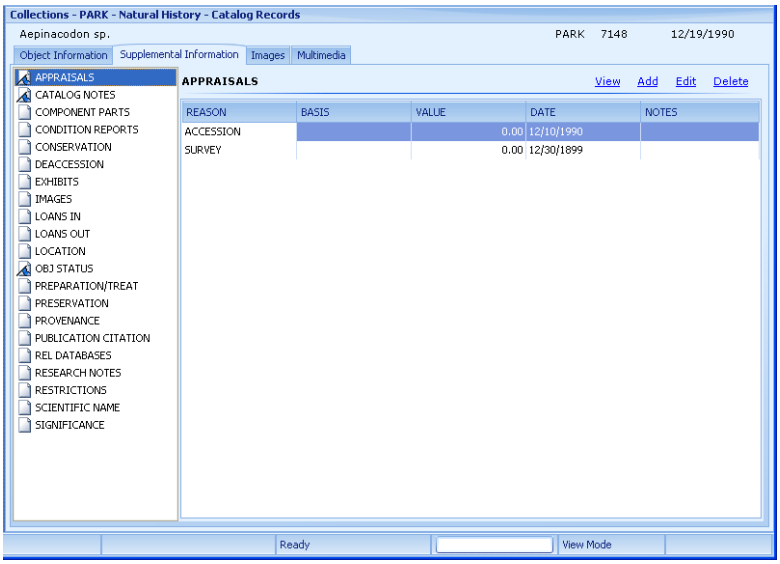
Note: The program creates the Object Status supplemental record, but the program does not prompt you for information to complete the record.

2. *What supplemental records are created automatically by the program?*

The program automatically creates supplemental records for deaccessions, exhibits, restrictions, loans in, loans out, and preparation/treatment. Each of these supplemental records has a corresponding associated module. When you create a record in the associated module, such as an outgoing loan record, you can attach catalog records to it. The program will then automatically create supplemental records for each attached catalog record. Refer to Chapter 4, Associated Modules, for instructions on completing records in the associated modules.

3. *How do I know whether a supplemental record contains information?*

The supplemental records are located on the Supplemental Information tab on the Object Catalog Record. When you look at the list of supplemental records, a flag icon  marks the records that contain information.



F. Printing the Record

Refer to Chapter 5, Reports and Forms, for additional information.

1. *How do I print a catalog record?*

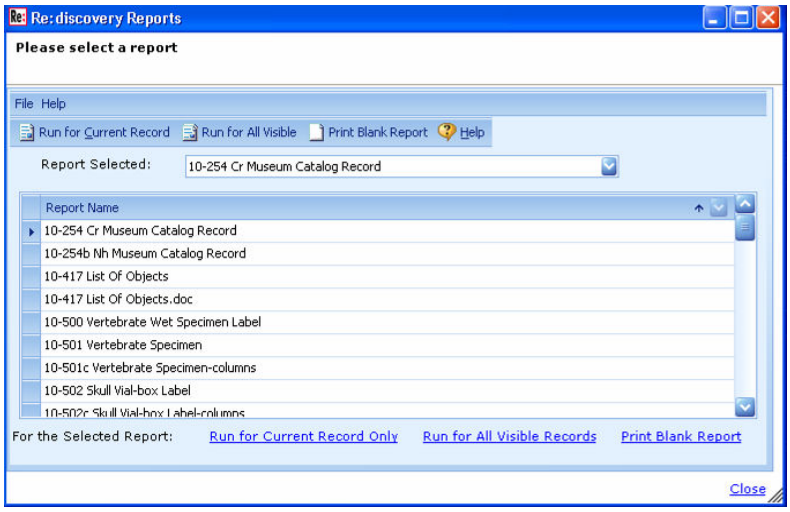
There are three ways to print the information in a catalog record:

NPS Form 10-254B (selected fields)
or
DOI NH Museum Catalog Record

The NPS Form 10-254B and the DOI NH Museum Catalog Record reports print on blank paper. The NPS Form 10-254B is the same as the preprinted Form 10-254B.

To access and print the NPS Form 10-254B or the DOI NH Museum Catalog Record report, follow these steps in View Mode:

- click on the Re:discovery Reports icon on the button bar, *or*
- go to Record on the menu bar and choose Reports from the pull-down menu. Select Re:discovery Reports from the submenu.



- select 10-254b Nh Museum Catalog Record or the DOI NH Museum Catalog Record to print the natural history catalog record

- select Run for Current Record Only or Run for All Visible Records. You can print one record or a group of records. Refer to Chapter 7 for creating groups of records.
- choose the Destination (Printer, Screen or RTF) and then click Print

Complete Record (all fields)

The program allows you to print all the fields on the record that contain data, including expanded memo fields. The fields print alphabetically on 8½ x 11 inch paper.

To access and print the complete record, follow these steps in View Mode:

- click on the Re:discovery Reports icon  on the button bar, *or*
- go to Record on the menu bar and choose Reports from the pull-down menu. Select Re:discovery Reports from the submenu.
- select All Fields to print the entire catalog record
- select Run for Current Record Only or Run for All Visible Records. You can print one record or a group of records. Refer to Chapter 7 for creating groups of records.
- choose the Destination (Printer, Screen or RTF) and then click Print

Full View

To print the record in Full View:

- click the Full View icon  on the button bar,
- click the Print button in the Full View window

2. *Must I print a catalog record?*

No. Printing catalog records at the unit is optional.

For NPS, you must submit electronic records on a fiscal year basis to the NPS National Catalog in Harpers Ferry, West Virginia. National Catalog staff will print an archival copy of the 10-254B for storage there. Upon your request, the National Catalog staff will print paper copies of 10-254Bs for your park.